29   PreAward Survey-Informal

29.1   *PreAward Survey-Informal Overview*

The Informal PreAward Survey screen (Figure 29-1) allows you to enter information about Informal PreAward Surveys such as the dollar value involved and who the requester is. This function was modified for the DIRAMS Version 5 release.

Note: Currently, you cannot enter certain special characters (e.g., apostrophes and semicolons) into some data boxes.

Figure 29-1 Informal PreAward Survey Screen

29.1.1 To Add or Create New Record

Insert Icon

1. To add (insert) a new record, click the **Insert** icon on the tool bar or select **File: New** from the menu bar. The system prepares the screen for you to enter the requested information.

2. Enter the requested information, then save your work.

29.1.2 To Add Multiple New Records

Cancel Icon

If you have to enter multiple new records, enter one record. Then save the current record by clicking the **Save** icon on the tool bar or selecting **File: Save** from the menu bar. Then to clear the screens for your next new record, either click the **Cancel** icon or select **File: Cancel**.

<div align="center">or</div>

Click on the **Insert** icon on the tool bar or select **File: New** from the menu bar. A message box appears informing you that unsaved changes exist, and asking you if you want to save them. Click **Yes** to save. If you click **Yes**, a message informs you of a successful save. Click **OK** to close this message. The system prepares the screen for another entry. (Or click **No** on the unsaved changes message box if you do not want to save. Or click **Cancel** to return to the current record instead of inserting a new one.)

29.1.3 To View or Edit Existing Record

Search Icon

1. Click the **Search** icon on the tool bar or select **File: Open** from the menu bar. When you do, a Search window (Figure 29-2) appears. You can use this window to search for a particular **CAGE Code**, **Contractor Name** or **Date Requested**. You can also search for a particular **CAGE Code** *and* **Date Requested** *OR* for a particular **Contractor Name** *and* **Date Requested**.

Figure 29-2 Informal PreAward Search Pop-Up Window

2. Enter the desired information.

- To specify a **CAGE Code**:

    A. Click on the circle in front of **CAGE Code**. The cursor appears in the **CAGE Code** data box.

    B. Type in the desired **CAGE CODE** (5 alphanumeric characters).

- To specify a **Contractor Name**:

    A. Click on the circle in front of **Contractor Name**. The cursor appears in the **Contractor Name** data box.

    B. Type in the desired **Contractor Name** (up to 28 alphanumeric characters).

Note: You do not have to enter the name in its entirety (up to the first 28 alphanumeric characters); however, the more letters you correctly enter, the shorter the list of names that will meet your search criteria.

- To specify **Date of Request**:

    A. Click on the circle in front of **Date of Request**. The cursor appears in the **From** data box.

    B. Type in a beginning date (MMDDYY, MM/DD/YY or DD-MON-YYYY format) that includes the request date for the record you want to find, then press **Tab** or **Enter**. The cursor moves to the **To** data box.

    C. Type in an ending date (MMDDYY, MM/DD/YY or DD-MON-YYYY format) that includes the request date for the record you want to find. (For example, if you know that the request was made during the week that included May 22, 1996, type 052096 in the **From** data box. Next type 052496 in the **To** data box.)

Note: If you know that it was requested on May 22, 1996, type in 052296 in both the **From** and **To** data boxes.

3. Press **Tab** or **Enter**. The application searches for matching records. Matching records are displayed on the bottom of the Search window (Figure 29-3).

Note: If a single record is found after you specify your search criteria, it is displayed on the Informal PreAward screens (i.e., the Search Results window does not appear).
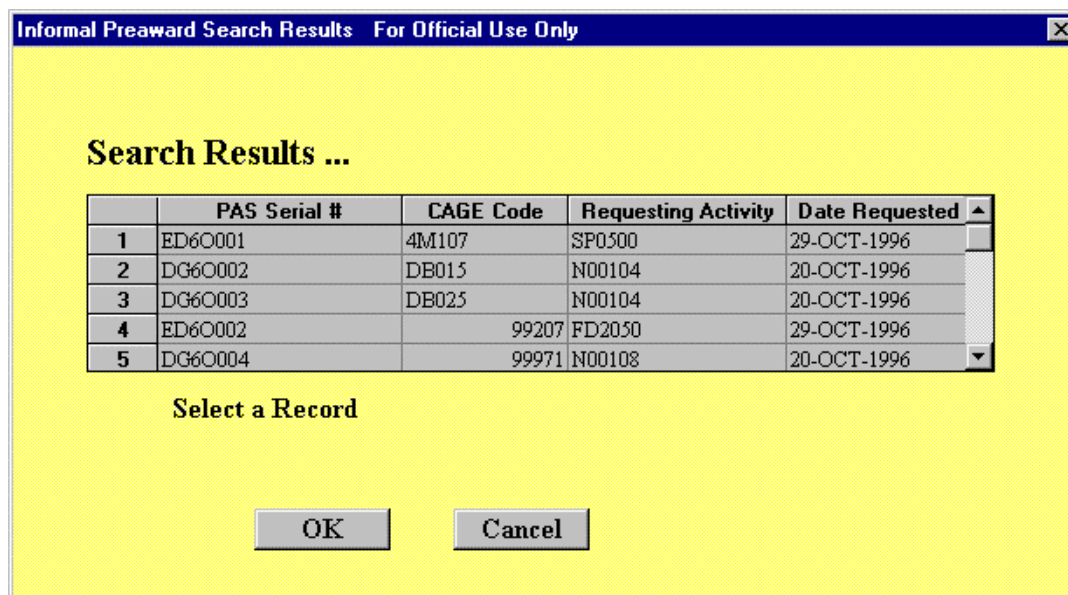

Figure 29-3 Informal PreAward Search Results Pop-Up Window

4. Select (click on) the one you want.

5. Click **OK**. Information associated with the record you selected is displayed on the Informal PreAward screen.

<div align="center">or</div>

Click **Cancel** to close the Search Results window.

Note: If no record is found matching the information you entered, a pop-up window appears (Figure 29-4). Click **OK** to close the window. You can then choose to search for a record again, add a record, go to another Metrics function or exit the Metrics application.
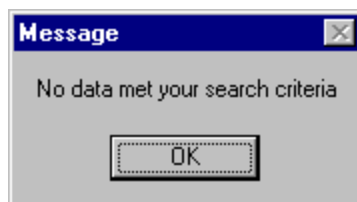

Figure 29-4 No Data Found Pop-Up Message

29.2   Informal PreAward Survey Screen 1 of 1

When this screen first opens, you can either insert a new record (Section 29.1.1) or search for an existing one to open (Section 29.1.3). The delete procedure is explained in Chapter 6.

Figure 29-5 Informal PreAward Survey Screen Fields
Note: Numbers in data boxes indicate corresponding section numbers.

29.2.1   Fields for Informal PreAward Survey Screen 1 of 1

29.2.1.1   CAGE Code

Enter the 5-character Commercial and Government Entity (CAGE) Code that identifies the contractor/location. This is an optional data field, but if entered, it is validated against SDW/SICM. If valid, the CAO-CAGE Selection window appears as explained in Section 10.2.8. Then when you select the CAO-CAGE Code combination you want on the CAO-Selection window, the corresponding **Offeror** information is displayed in the **Offeror** data boxes.

Note: Because the **CAGE Code** is optional, you can leave the box blank and move on to the next data box by pressing **Tab**. You can add this **CAGE Code** at a later date.

29.2.1.2   Offeror

The Offeror data boxes (name, address, city, state and zip) are automatically populated based on the **CAGE Code** that is entered (29.2.1.1), and it is protected.

29.2.1.3   CAO Organization Code

This protected data box is automatically populated with the Contract Administration Office (CAO) Organization Code (2-5 alphanumeric characters) associated with the Username entered during the login process.

29.2.1.4   Informal No

This protected data box is automatically populated after the CAGE Code is entered with a unique identifier (up to 9 alphanumeric characters). The first two characters represent the CAO Organization Code of the current user. The third position is numeric, the last digit in the fiscal year. The fourth position is the month represented as a number (1=January, 2=February, 3=March, 4=April, 5= May, 6=June, 7=July, 8=August and 9=September) or alphabet letter (O=October, N=November and D=December) The fifth, sixth and seventh characters are sequential numbers also generated by the system.

Note: The fiscal year and the month are determined by the system (current) date minus ten days. Therefore, the record you enter during the first ten days of the month will reflect the previous month (and year if the month is January) in the **Informal No**.

29.2.1.5   Solicitation No

Enter a unique identifier (up to 17 alphanumeric characters) for the request.

29.2.1.6   Dollar Value

Enter the value (dollar amount) of the request or solicitation. You can enter up to fourteen (14) digits, either as a whole dollar amount or as dollars and cents.

29.2.1.7   Requesting Activity

Enter the 6-character (alphanumeric) DoDAAC code that identifies the Requesting Activity.

Note: If the Requesting Activity DoDAAC is not available, use your own CAS Activity DoDAAC in its place.

29.2.1.8   Requesting Activity Name

This protected data box is automatically populated based on the Requesting Activity code entered above (29.2.1.7).

29.2.1.9   Requester Name

Enter the name of the person requesting the informal survey (up to 28 alphanumeric characters).

29.2.1.10   Requester Phone

Enter the telephone number (10-26 digits) of the person requesting the informal survey. If you enter ten (10) digits, the number is automatically formatted as xxx-xxx-xxxx. If you enter 11-26 digits, the number appears exactly as you type it.

29.2.1.11   Requester DSN

Enter the Defense Switched Network (DSN) number (7 or 10-15 digits) of the person requesting the informal survey. If you enter seven (7) digits, the number is automatically formatted as xxx-xxxx. If you enter ten (10) digits, the number is automatically formatted as xxx-xxx-xxxx. If you enter 11-15 digits, the number appears exactly as you type it.

29.2.1.12   Date Requested

Enter the date (MMDDYY, MM/DD/YY or DD-MON-YYYY format) on which the Buying Activity requested Informal information. The Date Requested must be the same as or earlier than the current date (Date Requested $\leq$ System Date). This is a required field.

29.2.1.13   Response Date

Enter the date (MMDDYY, MM/DD/YY or DD-MON-YYYY format) on which the PreAward Survey manager responded to the requester. The Response Date must be the same as or later than the Date Requested and the same as or earlier than the current date (Date Requested $\leq$ Response Date $\leq$ System Date). This is a required field.

29.2.1.14   Item/Service

Enter a short descriptor (up to 35 alphanumeric characters) for the item or service.

29.2.1.15   Recommend On-Site Survey be Conducted

Select the circle in front of **Yes** or the circle in front of **No** to indicate whether or not an on-site survey is recommended. This is a required field.

29.2.1.16   Remarks

Type in any additional information (up to 250 alphanumeric characters) pertinent to the informal survey.

Note: If you enter more than the allowed number of characters, a message pops up when you **Tab** out of the text box. You must then edit the text so that it contains no more than the maximum allowed number of characters before you can save the record.